

Digi Sales App

application overview

Mayur Mehta | 03-04-2017

# Table of Contents

1. Introduction
2. Application Flow
   1. Flow Diagram

2.2 Application Module

2.2.1. Login

2.2.2. Dash Board

2.2.3. Create Lead

2.2.4. My Lead

2.2.5. About Us

2.2.6. Logout

1. Introduction

* Why it is required?

Whenever any new customer wants to open new bank account, Credit-card, Debit-Card etc. with bank, then they have to do all this things through DSA (Digital Sales Agent).DSA will collect information from customer and will submit to bank.

* + Customer
  + Digital Sales Agent
* Bank

Now world is moving toward digitalization and paperless work. For this FGB Digi Sales App will come into picture. This application is mainly targeted for DSA. It is mobile application which will make easy task for DSA to collect information from customer and to submit to bank. Moreover it will also help to save incomplete data of customer and also help to get information of out stationed customer information from other out stationed DSA.

* + Customer

Digi Sales

App Used by Digital Sales Agent

* Bank

1. Application Flow

2.1 Application Flow Diagram

App Launch

Successful

**Dash Board**

**Screen**

Login Screen

OTP and Password Verification of DSA

Log Out

About Us

**My lead**

**Create Lead**

Log Out

Saved LEAD

Assigned LEAD

Submitted LEAD

DSA will enter Lead data

DSA will enter Lead data to complete form

Saved data or Saved Lead

Submitted to Bank

OTP verification of Customer

ECB Consent

Complete data

WAS Layer

Incomplete Data

Check complete or incomplete Lead data

Successful

* 1. Application Module

2.2.1 Login:

In this screen DSA will login through user Id and password, after entering user Id and password, DSA will receive OTP (One time Password) message in own mobile, DSA will enter this OTP and will be verified. After successful login DSA will be navigate to Dash Board Screen.

2.2.2 Dash Board:

In this screen DSA can able to see PIE Chart, Bar Chart and List View in segment view. In this screen there will be hamburger menu which contains following options:

* Create Lead,
* My Lead,
* Dash Board,
* About Us
* Log Out.

On tapping any of this option DSA will be navigated to equivalent screen.

2.2.3 Create Lead:

In this screen is used by DSA for creating Lead (Customer Information).DSA will enter customer information by taking it from customer. If customer will not be able to provide some information then it can be saved. This Saved Lead (Incomplete Lead) will be saved into WAS Layer. If all information is taken from customer then after completing this form DSA will be navigated to ECB Consent page. In Consent page customer will agree to share information and will enter OTP received by own mobile. After this Lead will be submitted.

2.2.3 My Lead:

In this screen following options will be available for Lead:

* Submitted
* Assigned
* Saved
* Submitted Lead :

DSA can able view which leads are submitted and what is the status of that Lead.

* Assigned Lead :

DSA will be assigned some Lead which are incomplete and DSA has to complete Lead and submit. For example, customer from Abu Dhabi is in Dubai and creating account through DSA of Dubai then this Lead will be send to Abu Dhabi DSA as Assigned Lead. Then Abu Dhabi DSA will complete Lead and submit.

* Saved Lead :

While creating Lead, some Lead are not submitted and saved due to lack of information. Later DSA can see those saved Lead and can complete Lead by taking missing information from customer. After completing Lead DSA will submit.

2.2.4 about Us:

This screen Contains Information of Bank.

2.2.5 Log Out:

DSA can Log Out from application from tapping Log Out from hamburger menu.